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ABSTRACT

This checklist is designed as a tool for individuals involved in developing, evaluating, and enhancing workplace education programs. Program planners may use the checklist to determine the nature of recommended program components and evaluation tools, and persons involved in active workplace education programs may use it to make benchmark comparisons and/or explore enhancements to existing program components and evaluation designs. Section 1 lists indicators pertaining to the following aspects of program design and administration: program design and planning, education center development and maintenance, workplace educational skills analysis, curriculum development, program support services, participant recruitment and program promotion, peer advising, instruction, participant assessment, professional development, and program evaluation. Compiled in Sections 2 and 3 are participant achievement and program outcome indicators. Presented in Section 4 are examples of the following types of evaluation tools that may be used separately or in various combinations: stakeholder anecdotal information, participant achievement data, workplace education program data, and workplace data. Guidelines for using the checklist and a glossary of key terms are included. (MN)

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Workplace Education Evaluation Design Checklist ✔

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The *Workplace Education Evaluation Design Checklist* was prepared by Donna Manly (Center on Education and Work, University of Wisconsin - Madison) based on the extensive dialogue and work of the Program Evaluation Committee for the Wisconsin Workplace Partnership Training Program.

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How to Use This Checklist

The *Workplace Education Evaluation Design Checklist* is a tool to aid in developing, evaluating, and enhancing workplace education programs.

For those planning to implement workplace education programs, this checklist may be used to determine the nature of recommended program components (Section 1), program effectiveness measures (Sections 2 and 3), and tools for use in the evaluation process (Section 4). For those involved in active workplace education programs, this checklist may be used for benchmark comparisons and to explore enhancements to existing program components and evaluation designs.

Checklist Uses

- ☑ A Workplace Education Program Planning and Design Tool
- ☑ An Evaluation Planning and Design Instrument
- ☑ A Management-Labor-Education Partnership Decision-Making Tool
- ☑ An Action Plan for Future Program or Evaluation Enhancements

It is suggested that each workplace education management-labor-education partnership complete this checklist as a team. As components, measures and tools are selected for use, partners may simply check the box before each item or enter a number designating its priority for implementation or improvement.

Definitions of Key Terms

Participants — Participants are employees who receive instruction or educational services through the workplace education program.

Partners — Partners are responsible for initiating and maintaining a workplace education program. Typically, workplace education partnerships involve at least one decision-maker representing the employer (a manager), the workforce (a labor leader, if it is a unionized workforce; or an employee representative, if the workforce is not unionized), and the education partner (e.g., the Technical College Workplace Education Coordinator, etc.).

Peer Advisors — Most commonly, Peer Advisors are volunteers from all levels of the employer organization; often a majority are program participants. Peer Advisors are committed to the success of the workplace education program and typically provide information to other employees one-on-one, assist with marketing and promotional activities, obtain employee input, and aid in furthering the program goals and objectives.

Stakeholders — Stakeholders are individuals with a vested interest in the success of the workplace education program. Most often workplace education stakeholders include: management-labor-education partners, program participants, steering committee members, and peer advisors.

Steering Committees Steering Committees often are formed to guide the development and continuation of a workplace education program. Membership typically consists of one to three representatives from each of the partners as well as participants, peer advisors, and other representatives who are involved in or affected by the program (e.g., training, human resource and quality department staff, and supervisors).

WESA Workplace Educational Skills Analysis (WESA) is a process used to identify and analyze basic educational skills required to satisfactorily perform a particular job. Other similar processes include: job task analyses and literacy audits. The six stage WESA process is fully described in the *Workplace Educational Skills Analysis Training Guide*.

Other Resources

For more information on this and other workplace education publications, please complete and return the information request form on the last page of this booklet.

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Section 1

Program Design and Administration Indicators

SECTION 1 -- PROGRAM DESIGN AND ADMINISTRATION INDICATORS

Below is a list of quality indicators for the design and administration of effective workplace education programs. Indicators are provided for the following recommended program components: program design and planning, education center development and maintenance, workplace educational skills analyses, curricula development, program support services, participant recruitment and program promotion, peer advising, instruction, participant assessment, professional development, and program evaluation.

Which of these indicators are appropriate to consider in evaluating your workplace education program?

■ PROGRAM DESIGN AND PLANNING

Program design activities include:

- ☐ Forming a strong management-labor-education partnership.
- ☐ Completing a comprehensive workplace education needs analysis with input from all levels of the organization.
- ☐ Establishing a program steering committee with representation from each partner, participants, peer advisors, and other stakeholders.
- ☐ Clearly identifying partner and committee member responsibilities and including these and other program expectations in a written partnership agreement.
- ☐ Developing clearly defined program goals and objectives which address continuous program improvement.
- ☐ Identifying decision items such as the nature of participation (voluntary and released or compensated time, etc.) and participant recognition (e.g., bonuses and certificates).
- ☐ Developing program policies which incorporate the input of all stakeholders, are non-discriminatory, and meet all other legal, contractual, and program-related requirements.
- ☐ Selecting highly qualified instructional staff who best meet the needs of the worksite and the program.
- ☐ Developing a written implementation plan including resource allocation, realistic timelines, and priorities for action relative to all program components.
- ☐ Identifying committed employees to volunteer as *peer advisors.*
- ☐ Other:

On-going program planning activities:

- ☐ Are driven by a strong, long term management-labor-education partnership.
- ☐ Are implemented by an active program steering committee empowered to guide the program.

- ☐ Involve consensus decision-making by all partners.
- ☐ Are based on clearly defined goals and objectives established for the program.
- ☐ Are responsive to evolving stakeholder needs.
- ☐ Integrate program activities with other relevant workplace or partner-sponsored initiatives such as technical training.
- ☐ Other:

■ EDUCATION CENTER DEVELOPMENT AND MAINTENANCE

Education center development activities include:

- ☐ Locating space for an education center which is on-site, convenient for employees, and meets local, state and federal standards (e.g., Americans with Disabilities Act).
- ☐ Designing individual and group learning facilities within the education center.
- ☐ Creating an environment to enhance learning (e.g., quiet, comfortable, and accommodates multiple instructional approaches and participant learning styles).
- ☐ Other:

Education center maintenance activities:

- ☐ Provide sufficient and appropriate equipment, furniture, and instructional materials.
- ☐ Foster an environment which encourages learning.
- ☐ Other:

■ WORKPLACE EDUCATIONAL SKILLS ANALYSES

Workplace Educational Skills Analyses:

- ☐ Involve all stakeholders in the design and implementation stages.
- ☐ Are conducted efficiently and effectively.
- ☐ Produce data and reports meaningful to stakeholders.
- ☐ Other:

Workplace Educational Skills Analyses are used to:

- ☐ Design individualized education plans for participants and aid with career planning.
- ☐ Develop workplace and job-specific curricula.
- ☐ Create competency-based assessment measures.
- ☐ Incorporate workplace materials in instruction.
- ☐ Other:

■ CURRICULA DEVELOPMENT

Curricula development processes and products:

- ☐ Include input and feedback from all stakeholders and address evolving stakeholder needs.
- ☐ Are based on workplace educational skills analyses.
- ☐ Use appropriate workplace, job-related and basic skills materials to promote contextual learning and improve job performance.
- ☐ Are without bias and appropriate to the population.
- ☐ Other:

■ PROGRAM SUPPORT SERVICES

Support services such as child care, educational counseling, and other employee assistance programs:

- ☐ Effectively minimize barriers to program participation for all employees regardless of work shift.
- ☐ Are based on continuing assessments of workforce needs for support services.
- ☐ Are cost-effective and administered efficiently and uniformly.
- ☐ Are effectively promoted with potential and current program participants.
- ☐ Other:

■ PARTICIPANT RECRUITMENT AND PROGRAM PROMOTION

Participant recruitment activities:

- ☐ Are innovative and ongoing.
- ☐ Reach target audiences with accurate information which motivates employees to initiate or continue program participation.
- ☐ Are based on previously effective activities used in the program and in other workplace education initiatives.
- ☐ Involve multi-media approaches including print, video, computer, and one-on-one verbal communications.
- ☐ Are driven by stakeholder needs and suggestions.
- ☐ Involve on-going peer advisor initiatives.
- ☐ Other:

Program promotional activities:

- ☐ Are varied and conducted on a regular basis.
- ☐ Orient, update and maintain support from all levels of the partnership organizations.
- ☐ Include opportunities for participant family members to become familiar with the program (e.g., education center open houses and newsletters).
- ☐ Involve all stakeholders in planning and implementation.
- ☐ Include sharing information with others interested in initiating workplace education programs.
- ☐ Other:

■ PEER ADVISING

Peer Advisor activities:

- ☐ Are continuous and based on program needs, goals and objectives.
- ☐ Aid in the development and furtherance of the workplace education program.
- ☐ Involve one-on-one communications with all employees.
- ☐ Provide accurate and motivational program information.
- ☐ Utilize identified best practices.
- ☐ Other:

■ INSTRUCTION

Instructional activities:

- ☐ Are driven by stakeholder needs and individualized education plans developed for program participants.
- ☐ Respect the diverse educational, work, and cultural backgrounds of participants.
- ☐ Are delivered in structured (e.g., mini courses) and more flexible (e.g., open-entry/open-exit) environments.
- ☐ Include multiple training methods to address individual learning styles (self-paced, one-on-one, formal and informal group-based, computer-assisted, video-based, etc.).
- ☐ Use workplace, job-related, and basic skills materials to promote contextual learning and improve job performance.
- ☐ Are offered at convenient times for employees.
- ☐ Other:

■ PARTICIPANT ASSESSMENT

Participant assessment activities:

- ☐ Are explained in advance to participants and are undertaken to motivate and record learner progress.
- ☐ Involve pre-instruction, interim, and post-instruction assessments that are competency-based.
- ☐ Are linked to individualized education plans, appropriate Workplace Educational Skills Analyses, and instructional content.
- ☐ Involve formal and informal assessment methods such as performance-based, self, portfolio, alternative, standardized, and instructor-developed.
- ☐ Are **not** used for purposes other than education and training.
- ☐ Protect the confidentiality of participant assessment data.
- ☐ Include more than one perspective (e.g., participant, employer, employee, supervisor, and instructor).
- ☐ Other:

■ PROFESSIONAL DEVELOPMENT

Professional development activities:

- ☐ Address identified stakeholder needs.
- ☐ Involve practice and systematic follow-up activities.
- ☐ Are supported by sufficient resources (e.g., time, money, and access).
- ☐ Other:

Professional development activities include:

- ☐ Orientation and training sessions for education partners and instructors on industry and organizational initiatives, and for private sector partners on available educational services.
- ☐ Initial and on-going training opportunities for all stakeholders relative to program components and services.
- ☐ In-depth instructor and peer advisor training relative to program responsibilities.
- ☐ Other:

■ PROGRAM EVALUATION

Program evaluation processes:

- ☐ Obtain on-going input and feedback on the program from all stakeholders, particularly participants.
- ☐ Are sensitive to evolving stakeholder needs.
- ☐ Address informational needs for future program decisions and desired evaluation products.
- ☐ Permit comparisons with other training programs and replication at multiple worksites, when applicable.
- ☐ Are realistic and efficient.
- ☐ Comply with all applicable legal and contractual requirements (e.g., Affirmative Action and Equal Employment Opportunity laws, and collective bargaining agreements).
- ☐ Protect the confidentiality of those participating in the program and in the evaluation process.
- ☐ Protect the proprietary interests of the employer.
- ☐ Are conducted by independent parties not directly involved with the program and by the program steering committee.
- ☐ Provide for longitudinal data collection and analysis.
- ☐ Are designed to yield qualitative and quantitative data.
- ☐ Involve the data collection efforts of all stakeholders.
- ☐ Incorporate input and feedback from all stakeholders on the evaluation design and implementation activities.
- ☐ Other:

Program evaluation products:

- ☐ Include analyses of program components relative to effectiveness, efficiency, use of human and other resources, best practices and continuous improvement efforts.
- ☐ Assess the linkages between the workplace education program and the worksite and suggest means of strengthening those linkages in the short and long term.
- ☐ Include only substantiated or properly qualified program benefits or findings.
- ☐ Provide accurate and objective data documented in a manner usable by all stakeholders.
- ☐ Include analyses of demographic characteristics of participants and provide comparisons with the total workforce and intended target groups.
- ☐ Other:

Section 2

Participant Achievement Indicators

SECTION 2 -- PARTICIPANT ACHIEVEMENT INDICATORS

Common indicators of achievements by participants in workplace education programs are listed below. Would it be appropriate to evaluate whether, as a result of participation in your workplace education program, ***participants***:

- ☐ More effectively deal with technological, procedural, or other organizational changes?
- ☐ Enroll in other educational programs such as those sponsored by employers, Technical Colleges, universities, or other colleges?
- ☐ Demonstrate greater success in more advanced or other job-related training programs?
- ☐ Achieve short-term goals they set for themselves?
- ☐ Meet their long-term training and personal needs?
- ☐ Improve their interpersonal skills such as written communication, verbal communication and team work?
- ☐ Increase their involvement in employee suggestion or quality improvement programs?
- ☐ Improve their job performance?
- ☐ Demonstrate improved work habits such as being punctual more often, improving attendance and meeting deadlines with greater consistency?
- ☐ Become qualified for promotions or transfers to preferred jobs?
- ☐ Become qualified to retain a job which has been restructured or for which new performance standards have been created?
- ☐ Apply for internal or external positions for which they would not have applied prior to program participation?
- ☐ Demonstrate increased self-esteem and/or self-confidence?
- ☐ Show aggregated academic gains in workplace basic skills?
- ☐ Demonstrate aggregated attainment or improvement of job-related skills?
- ☐ Obtain General Equivalency Diplomas (GEDs) or other education, training, or skill mastery certificates?
- ☐ Indicate that program participation was beneficial to them?
- ☐ Demonstrate an increased ability to learn?
- ☐ Apply training and/or education results to non-work situations (e.g., using employee benefits more appropriately)?
- ☐ Become better prepared to function as parents and community members?
- ☐ Improve their effectiveness in dealing with the current work situation?

- ☐ File fewer formal grievances and/or employee complaints due to increased resolution of concerns through informal communication?
- ☐ Demonstrate increased knowledge of the organization and its initiatives, the job, and/or the community?
- ☐ Other:

Section 3

Program Outcome Indicators

SECTION 3 -- PROGRAM OUTCOME INDICATORS

To help determine the impact of the workplace education program within your workplace, would it be appropriate to evaluate whether the ***program***:

- ☐ Meets the established goals and needs of the organizations and stakeholders involved in the initiative?
- ☐ Meets the stated objectives of the program?
- ☐ Benefits all stakeholders involved in the program?
- ☐ Is cost-effective (yields a positive return on investment, or produces tangible and intangible benefits which justify training costs, etc.)?
- ☐ Prepares employees to more effectively deal with technological, procedural, or other organizational changes within the workplace?
- ☐ Promotes other initiatives within the workplace such as continuous quality improvement activities, employee suggestion programs, and technical training?
- ☐ Increases employee job satisfaction?
- ☐ Improves employee morale?
- ☐ Increases productivity?
- ☐ Enables higher level positions to be filled more frequently by promoting employees from within the organization, rather than recruiting persons employed outside the organization?
- ☐ Improves the quality of products manufactured or services provided?
- ☐ Increases employee self-esteem and/or self-confidence?
- ☐ Improves employee safety within the workplace?
- ☐ Increases collaboration and cohesiveness within the workforce and among workplace education program partners?
- ☐ Promotes lifelong learning by employees?
- ☐ Results in less re-training and on-the-job basic skills training?
- ☐ Increases employee job security?
- ☐ Other:

Section 4

Evaluation Tools

SECTION 4 -- EVALUATION TOOLS

Below is a compilation of evaluation tools which have been used independently and in various combinations by successful workplace education programs. Within your workplace, which of the following tools would be most useful in collecting the data you identified in the preceding sections as appropriate for evaluating your workplace education program?

- ■ **Stakeholder Anecdotal Information**
- ☐ Participant surveys and/or feedback
- ☐ Participant follow-up surveys
- ☐ Workshop or course surveys of program participants
- ☐ Surveys and/or feedback from employees who have **not** participated in the program
- ☐ Surveys and/or feedback from **former** program participants
- ☐ Instructor surveys and/or feedback
- ☐ Surveys and/or feedback from participants' supervisors and/or managers
- ☐ Peer Advisor feedback and/or surveys
- ☐ Local partner or program steering committee surveys and/or other feedback
- ☐ Focus group surveys and\or feedback from various departments or shifts
- ☐ Surveys and/or feedback from other appropriate sources (employee assistance programs, collective bargaining teams, quality or employee suggestion programs, training or human resource departments, etc.)

- ■ **Participant Achievement Data**
- ☐ Completion of parts or all of the General Equivalency Diploma (GED) or other education, training, or skills mastery certificates by participants
- ☐ Learner portfolios illustrating progress within the program
- ☐ Instructor diary or log of participant accomplishments
- ☐ Participant case studies
- ☐ Self-esteem and/or self-concept survey results
- ☐ Promotion and job transfer statistics
- ☐ Results on academic assessments (e.g., standardized tests, learner portfolios, and instructor-developed, competency-based assessments)
- ☐ Results on job-related performance assessments (e.g., pre- and post-competency-based performance assessments, competency checklists, job simulation assessments, and on-the-job observations)
- ☐ Results on "learning to learn" tests
- ☐ Enrollment and success in other educational or training programs

- ☐ Contributions to employee suggestion programs or other initiatives
- ☐ Other:

■ **Workplace Education Program Data**

- ☐ Cost effectiveness data
- ☐ Enrollment statistics for the program
- ☐ Participation data such as hours spent in the program
- ☐ Program retention and re-entry statistics
- ☐ Statistics on program objectives versus accomplishments
- ☐ Participant demographic data
- ☐ General program data such as hours of instruction provided, new initiatives undertaken, and resources allocated
- ☐ Workforce training needs surveys including program awareness and participation questions
- ☐ Data included in project reports such as those submitted to external funding sources, executives, and other decision-makers
- ☐ Other:

■ **Workplace Data**

- ☐ Work-related performance data
- ☐ Scrap, waste, rework, or downtime statistics
- ☐ Safety statistics (e.g., OSHA 2000 log and workers compensation claims)
- ☐ Employee turnover statistics
- ☐ On-the-job attendance statistics
- ☐ Employee exit interview data
- ☐ Salary and/or pay award data
- ☐ Employee performance evaluation data
- ☐ Customer satisfaction data (e.g., complaint, reject, or return statistics)
- ☐ Production, quality, or error rate statistics
- ☐ Training department data (less re-training, greater success in more advanced training programs, education incentive usage statistics, etc.)
- ☐ Recruitment data for higher level positions (e.g., increased recruitment from within rather than outside the organization)
- ☐ Job satisfaction statistics
- ☐ Missed and/or realized business opportunity data
- ☐ Control group data
- ☐ Other:

For additional information and to provide feedback regarding this checklist, please take a few minutes to complete the form below. Your feedback regarding this checklist will be extremely helpful for future publications.

Please return the completed form to Donna Manly, Center on Education and Work, University of Wisconsin - Madison, 964 Educational Sciences Building, 1025 West Johnson Street, Madison, WI 53706 - 1796.

For more information, call 1-800-446-0399.

☑ **Checklist Feedback**

I used this checklist to:
(Check all that apply)

- ☐ Develop a workplace education program
- ☐ Design an evaluation plan for a workplace education program
- ☐ Prepare a funding proposal
- ☐ As a reference
- ☐ Other: _____

How useful was this checklist to you?

- ☐ Very Useful
- ☐ Somewhat Useful
- ☐ Not Useful

Any comments or suggestions to improve the usefulness of this document?

_____

_____

_____

☑ **For More Information**

- ☐ I am interested in receiving an updated checklist when it is available.
- ☐ I am interested in receiving a listing of other workplace education publications available through the Center on Education and Work.

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Thank you!